

HR351: Updating Approved Salary Plans on Position**Updating Approved Salary Plans on Position Overview**

There are rare occasions when an agency seeks to extend the maximum salary limit on specific positions in order to recruit and retain incumbents. This Job Aid will address the process to update an Alternate Salary Plan and Grade on a Position.

Prior to DHRM changing the salary grade on a Position, the following steps will have been completed:

1. Agency HR identifies the need for an Alternate Salary Plan.
2. Agency HR requests DHRM approval of an Alternate Salary Plan, in writing to the DHRM Compensation Team for the respective Business Unit if none exists or an adjustment is required. Request shall include justification for the Alternate Plan, relevant pay factors, and contain a list of impacted positions.
3. DHRM approves or denies the Alternate Salary Plan.
4. If approved, DHRM will work with PPS to create the Alternate Salary Plan in Cardinal.
5. DHRM creates a help desk ticket to track the request.
6. PPS completes configuration of the new Alternate Salary Plan in Cardinal and updates the help desk ticket.
7. DHRM is notified of completion, verifies that the alternate salary plan is correct for the Business Unit and closes the help desk ticket.

After the above steps, the DHRM and Agency user will follow this Job Aid to complete the last three steps in the process:

1. DHRM updates the position(s) to reflect the new Alternate Salary Grade.
2. DHRM sends email to HR Agency to notify them of completion of the Alternate Salary Plan/Grade change.
3. Agency HR updates the Alternate Salary/Grade Table and Position(s) with step if applicable.
4. Update the incumbent's job record with the new compensation rate. For further information on Compensation Changes, see the Job Aid titled **HR351 How to Change Update Employee Compensation** Job Aid. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Table of Contents

DHRM Updates Position	2
Agency HR Adds or Updates Steps to the Alternate Salary/Grade Table	6
Agency HR Updates Position	10

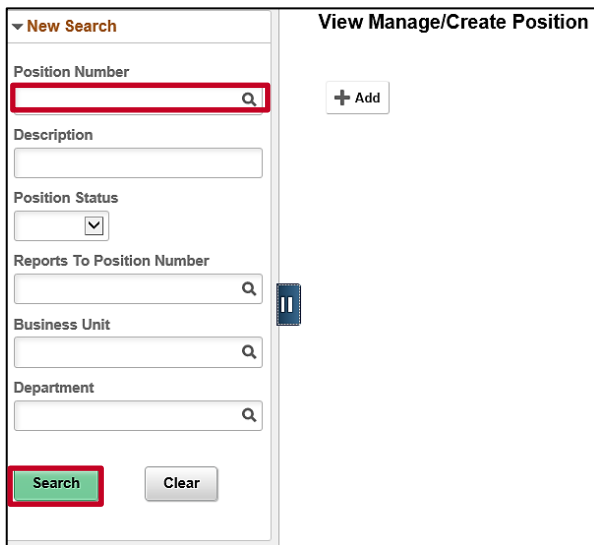
HR351: Updating Approved Salary Plans on Position**DHRM Updates Position**

After PPS configures the new Alternate Salary Plan, DHRM will update the Position.

1. Log into Cardinal using a DHRM HR Operations role.
2. Navigate to the **Position** page using the following path:

**Navigator > Organizational Development > Position Management > Maintain Positions
Budget > Manage/Create Position**

The **View Manage/Create Position Search** page displays.



3. Enter the applicable Position Number in the **Position Number** field.
4. Click the **Search** button.

HR351: Updating Approved Salary Plans on Position

The search results display in the bottom portion of the page.



View Manage/Create Position
1 results found.

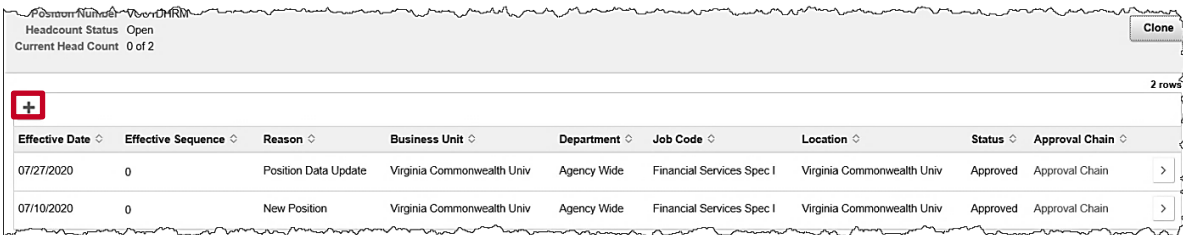
Chart ☐ No

+ Add

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
VCU1DHRM	Financial Services Spec I		23600	VCU	99999	Active	19031	0/2

- Select the applicable Position by clicking the corresponding row.

The **Position Details** page displays for the applicable Position.



Position Number: VCU1DHRM
Headcount Status: Open
Current Head Count: 0 of 2

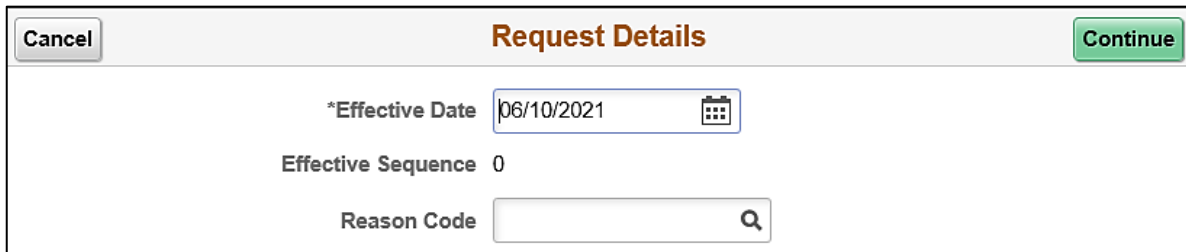
Clone

2 rows


Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
07/27/2020	0	Position Data Update	Virginia Commonwealth Univ	Agency Wide	Financial Services Spec I	Virginia Commonwealth Univ	Approved	Approval Chain
07/10/2020	0	New Position	Virginia Commonwealth Univ	Agency Wide	Financial Services Spec I	Virginia Commonwealth Univ	Approved	Approval Chain

- Click the **Add a New Row** icon (+) to make the change to the Position.


The **Request Details** page displays in a pop-up window.



Cancel **Request Details** Continue

*Effective Date 06/10/2021 

Effective Sequence 0

Reason Code 

- The **Effective Date** field defaults to the current date. Update as needed using the **Effective Date Calendar** icon.

Note: If a respective pay increase regarding this alternate grade is planned, ensure that the effective date is prior to the date of the compensation change.

- The **Effective Sequence** field will default to the next sequential number if other changes have been entered on the Position with the same effective date.
- Select "UPD" using the **Reason Code Look Up** icon.
- Click the **Continue** button.

HR351: Updating Approved Salary Plans on Position

The **Manage Position** page displays with the **Position Data** Step displayed by default.

<div>1 Position Data Visited</div> <div>2 Specific Information Not Started</div> <div>3 Budget Incumbents Not Started</div> <div>4 Review and Submit Not Started</div>	<p>Step 1 of 4: Position Data</p> <p>Effective Date 06/10/2021</p> <p>Effective Sequence 0</p> <p>Reason Code UPD</p> <p>Review Date <input type="text"/></p> <p>*Position Months 12.00</p> <p>Stmnt of Economic Interest Req'd <input checked="" type="checkbox"/> Yes</p> <p>VPA Covered <input checked="" type="checkbox"/> Yes</p>
--	---

11. Scroll down to the **Salary Plan Information** section.

The remaining sections display.

Salary Plan Information	
Salary Admin Plan <input type="text" value="SW"/>	Grade <input type="text" value="4"/>
Standard Hours <input type="text" value="40.00"/>	Step <input type="text"/>
Work Period <input type="text" value="W"/> Weekly	
<div>Mon 8.00</div> <div>Tue 8.00</div> <div>Wed 8.00</div> <div>Thu 8.00</div> <div>Fri 8.00</div> <div>Sat</div> <div>Sun</div>	

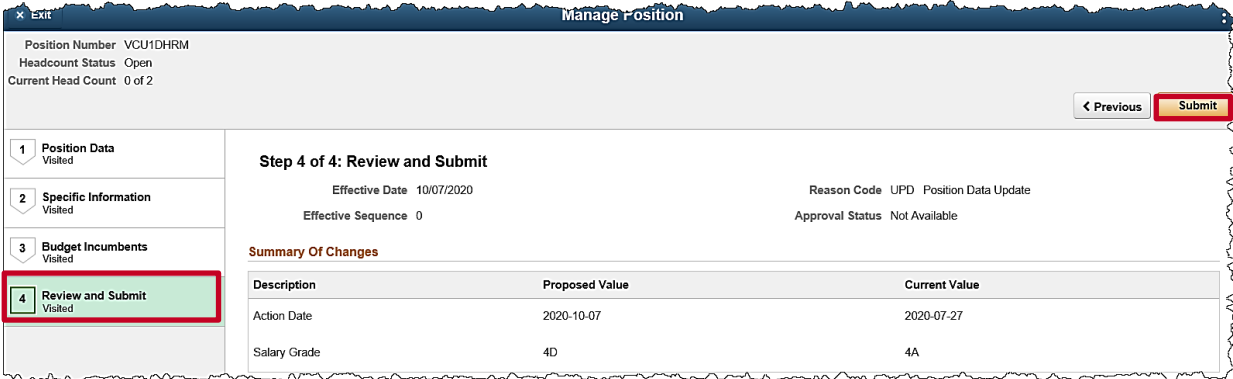
12. Review the **Salary Admin Plan** field for the Position.

13. Select the newly added Alternate Salary Plan/Grade value using the **Grade Look Up** icon.

14. Click the **Review and Submit** tab in the navigation panel.

HR351: Updating Approved Salary Plans on Position

The **Review and Submit** Step displays.



Manage Position

Position Number VCU1DHRM
Headcount Status Open
Current Head Count 0 of 2

< Previous **Submit**

Step 4 of 4: Review and Submit

Effective Date 10/07/2020
Effective Sequence 0

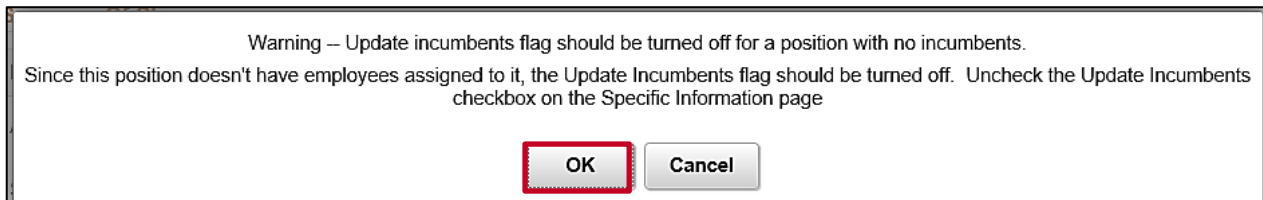
Reason Code UPD Position Data Update
Approval Status Not Available

Summary Of Changes

Description	Proposed Value	Current Value
Action Date	2020-10-07	2020-07-27
Salary Grade	4D	4A

15. Review the changes made to the Position and then click the **Submit** button.

If there are no incumbents in the Position, the following **Warning** displays.



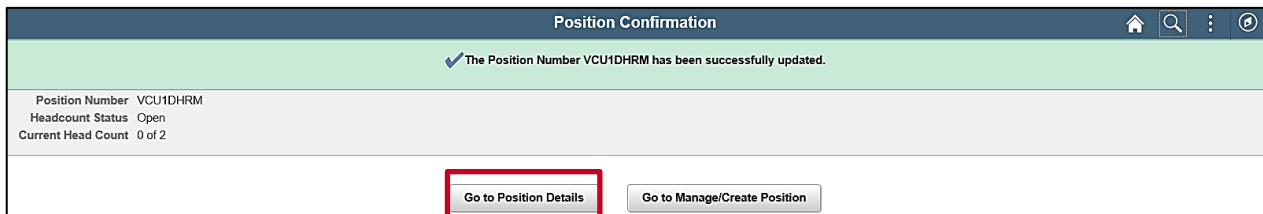
Warning – Update incumbents flag should be turned off for a position with no incumbents.

Since this position doesn't have employees assigned to it, the Update Incumbents flag should be turned off. Uncheck the Update Incumbents checkbox on the Specific Information page

OK Cancel

16. Click the **OK** button.

The **Position Confirmation** displays.



Position Confirmation

✓ The Position Number VCU1DHRM has been successfully updated.

Position Number VCU1DHRM
Headcount Status Open
Current Head Count 0 of 2

Go to Position Details Go to Manage/Create Position

17. Click the **Go to Position Details** button.

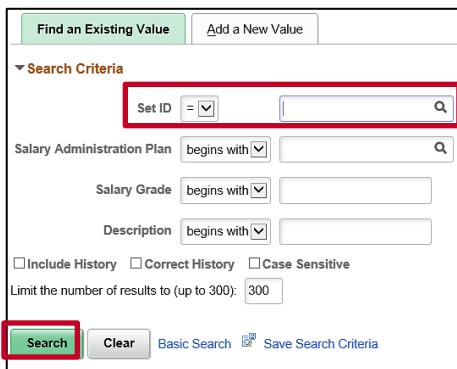
HR351: Updating Approved Salary Plans on Position**Agency HR Adds or Updates Steps to the Alternate Salary/Grade Table**

Note: If your agency is using Salary Steps, follow instructions in the section below to make adjustments to current steps, or to add/remove salary steps. If your agency does not use steps, skip to page 13.

1. Log into Cardinal using an Agency HR Administrator role.
2. Navigate to the **Salary Grades** page using the following path:

Navigator > Setup HCM > Product Related > Compensation > Base Compensation > Salary Grades

The **Salary Grades Search** page displays.



The screenshot shows the 'Salary Grades Search' page. At the top, there are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs is a section titled 'Search Criteria' with a dropdown arrow. Under 'Search Criteria', there is a 'Set ID' field with a dropdown menu and a search icon, which is highlighted with a red box. Below this are three fields: 'Salary Administration Plan' (with a 'begins with' dropdown and search icon), 'Salary Grade' (with a 'begins with' dropdown and search icon), and 'Description' (with a 'begins with' dropdown and search icon). At the bottom, there are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. Below these is a text input for 'Limit the number of results to (up to 300):' with the value '300'. At the very bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and two links: 'Basic Search' and 'Save Search Criteria'.

3. Enter the applicable Agency Set ID in the **Set ID** field.
4. Enter the applicable Alternate Salary Plan in the **Salary Administration Plan** field.
5. Enter the applicable Salary Grade in the **Salary Grade** field.
6. Click the **Search** button.



Human Resources Job Aid

HR351: Updating Approved Salary Plans on Position

The **Salary Grades** page displays with the **Salary Grade Table** tab displayed by default.

The screenshot shows the 'Salary Grade Table' tab selected. The page displays the following information:

- Set ID:** 76500
- Salary Administration Plan:** NV
- Location:** Northern Virginia
- Salary Grade:** 3
- Standard Hours:** 40.00
- Salary Basis:** A
- Annl Basis:**

The **Salary Grade** section shows:

- *Effective Date:** 01/01/1901
- Status:** Active
- Description:** Northern VA Extended Range 3
- Short Description:** NV Ext 3
- Additional Description:**
- Salary Matrix Code:**
- Rating Model:**
- Range Spread:** 229.2 %

The **Salary Ranges** table is displayed below:

	Minimum	Midpoint	Maximum
Annual	27,004.000	57,944.000	88,884.000
Monthly	2,250.330	4,828.670	7,407.000
Daily	103.860	222.860	341.860
Hourly	12.982692	27.857692	42.732692
BiWeekly			

7. Click the **Salary Step Components** tab.

The **Salary Step Components** tab displays.

The screenshot shows the 'Salary Step Components' tab selected. The page displays the following information:

- Set ID:** 76500
- Salary Administration Plan:** NV
- Location:** Northern Virginia
- Salary Grade:** 3
- Standard Hours:** 40.00
- Salary Basis:** A
- Annl Basis:**

The **Salary Grade** section shows:

- *Effective Date:** 10/20/2020
- Status:** Active
- Description:** Northern VA Extended Range 3
- Increment Type:** Spec
- Accum:**

The **Salary Step** section shows:

- *Step:** 1
- Step Description:** NV 3Q1 = 2,7004-88,884
- Months to Next Step Increment:**
- Hours to Next Step Increment:**

The **Salary Components** table is displayed below:

*Rate Code	Seq	Details	Comp Rate	Currency	*Frequency	Percent
STATE	0	Details	70017.000000	USD	A	

The **Totals** section shows:

Hourly Rate	Daily Rate	Monthly Rate	Annual Rate

Buttons at the bottom: Save, Return to Search, Notify, Add, Update/Display, Include History.

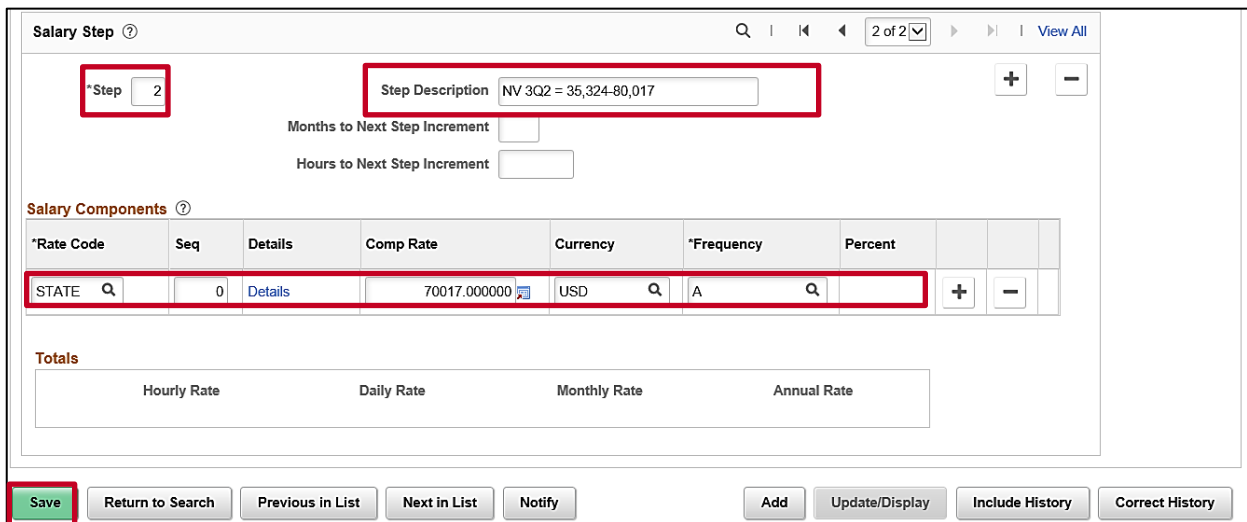
HR351: Updating Approved Salary Plans on Position

To add an additional step to an existing Salary Grade, continue with Step 8. To add steps to a new Salary Grade, continue with Step 18.

8. Click the **Add a Row** icon (+) within the **Salary Grade** section.
9. The **Effective Date** field defaults to the current date. Update as needed using the **Effective Date Calendar** icon.

Note: If a respective pay increase regarding this Alternate Grade/Step is planned, ensure that the effective date entered here is prior to the planned date of the pay increase.

10. Click the **Add a Row** icon (+) within the **Salary Step** section.
11. Enter the next sequential Step Number in the **Step** field.



The screenshot shows the 'Salary Step' form. At the top, there's a 'Step' field with the value '2' and a 'Step Description' field with the value 'NV 3Q2 = 35,324-80,017'. Below these are fields for 'Months to Next Step Increment' and 'Hours to Next Step Increment'. The 'Salary Components' section contains a table with columns: *Rate Code, Seq, Details, Comp Rate, Currency, *Frequency, and Percent. The first row has 'STATE' in the Rate Code field, '0' in Seq, 'Details' in Details, '70017.000000' in Comp Rate, 'USD' in Currency, 'A' in Frequency, and an empty Percent field. Below the table is a 'Totals' section with fields for Hourly Rate, Daily Rate, Monthly Rate, and Annual Rate. At the bottom, there are buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

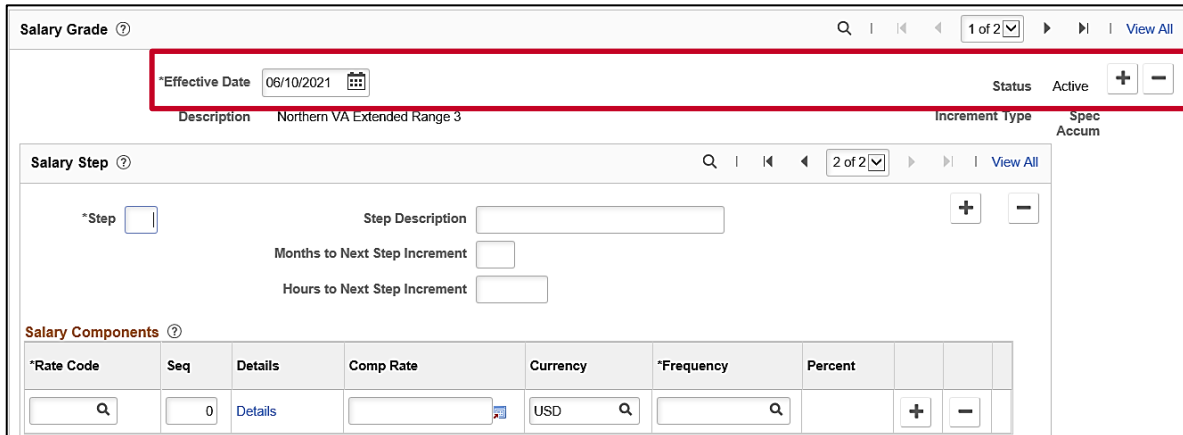
12. Enter a description for the Step in the **Step Description** field. (i. e., Min Step amount or Max Step amount)
13. Select "STATE" using the **Rate Code Look Up** icon.
14. Enter the annual salary amount for the Step in the **Comp Rate** field.
15. The **Currency** field defaults to "USD".
16. Select "A" (Annual) using the **Frequency Look Up** icon.
17. Click the **Save** button.

Note: If multiple steps are required, repeat Steps 8 – 17.


HR351: Updating Approved Salary Plans on Position

Note: If there is a need to add a step to a grade that has never reflected steps, continue to step 18.

18. The **Effective Date** field defaults to the current date. Update as needed using the **Effective Date Calendar** icon.



Salary Grade ?

*Effective Date 06/10/2021  Status Active + -

Description Northern VA Extended Range 3 Increment Type Spec Accum

Salary Step ?

*Step Step Description + -

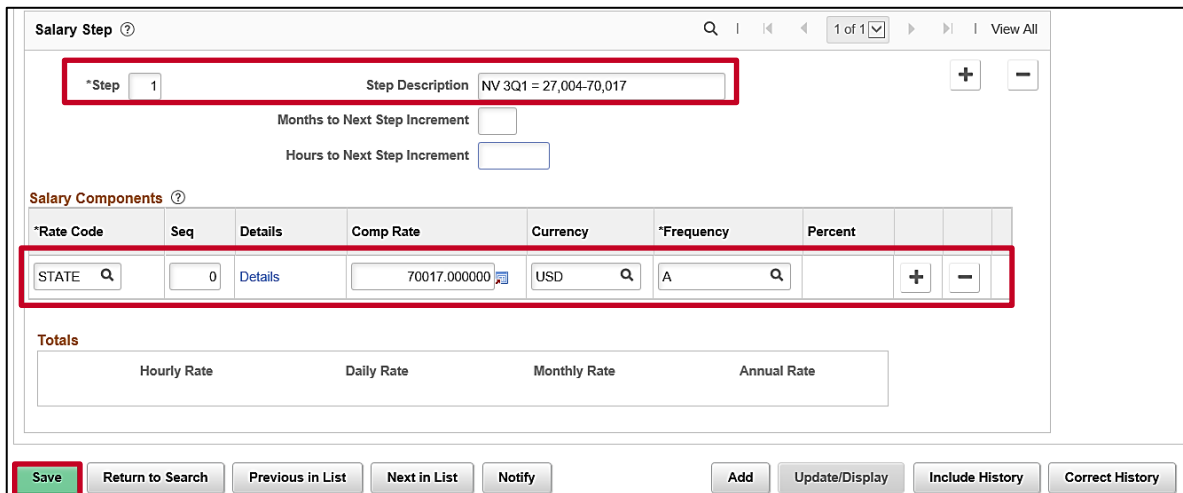
Months to Next Step Increment

Hours to Next Step Increment

Salary Components ?

*Rate Code	Seq	Details	Comp Rate	Currency	*Frequency	Percent		
<input type="text"/>	0	Details	<input type="text"/>	USD	<input type="text"/>		+ -	

19. Enter a Step Number of “1” in the **Step** field.
20. Enter a description for the Step in the **Step Description** field.
21. Select “STATE” using the **Rate Code Look Up** icon.
22. Enter the annual salary amount for the Step in the **Comp Rate** field.
23. The **Currency** field defaults to “USD”.
24. Select “A” (Annual) using the **Frequency Look Up** icon.







Salary Step ?

*Step 1 Step Description NV 3Q1 = 27,004-70,017 + -

Months to Next Step Increment

Hours to Next Step Increment

Salary Components ?

*Rate Code	Seq	Details	Comp Rate	Currency	*Frequency	Percent		
STATE 	0	Details	70017.000000 	USD 	A 		+ -	

Totals

Hourly Rate	Daily Rate	Monthly Rate	Annual Rate

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

25. Click the **Save** button.

Note: If multiple steps are required, refer to Steps 10 – 17 above.

HR351: Updating Approved Salary Plans on Position**Agency HR Updates Position**

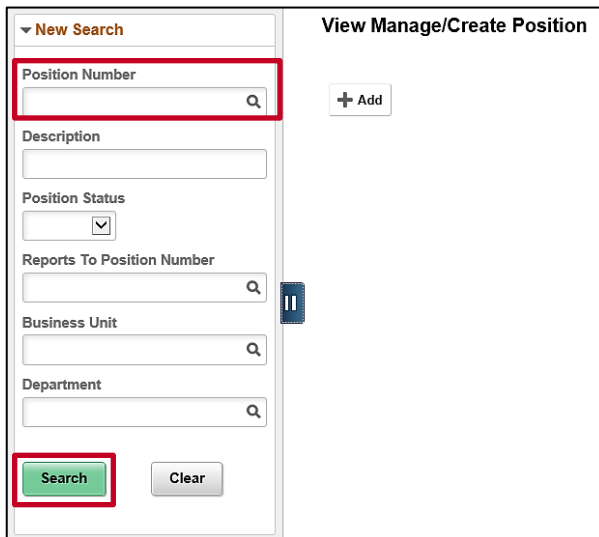
After DHRM updates the Position with the new Alternate Salary Plan and the Agency HR updates the Alternate Salary Plan/Grade table, the Agency HR will update the Position with the new Step in the Alternate Salary Plan.

Note: If a change is made to a position that an employee currently occupies (incumbent) the next step would be to insert into the affected job record and the compensation changed using the Pay Rate Change action code. See Job Aid titled **How to Change Updated Employee Compensation** for further details. This job aid can be found on the **Cardinal** website under **Learning**.

1. Log into Cardinal using an Agency HR Administrator role.
2. Navigate to the **View Manager/Create Position** page using the following path:

**Navigator > Organizational Development > Position Management > Maintain Positions
Budget > Manage/Create Position**

The **Manage/Create Position Search** page displays.



The screenshot shows the 'View Manage/Create Position' interface. On the left, there is a sidebar with a 'New Search' dropdown and several search filters: 'Position Number' (text input), 'Description' (text input), 'Position Status' (dropdown menu), 'Reports To Position Number' (text input), 'Business Unit' (text input), and 'Department' (text input). At the bottom of the sidebar are 'Search' and 'Clear' buttons. The 'Position Number' field and the 'Search' button are highlighted with red rectangles. The main area on the right is titled 'View Manage/Create Position' and contains an '+ Add' button.

3. Enter the applicable Position Number in the **Position Number** field.
4. Click the **Search** button.

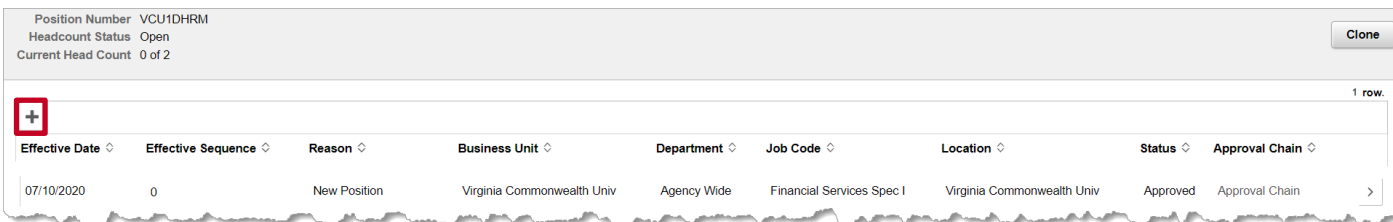
HR351: Updating Approved Salary Plans on Position

The search results display in the bottom portion of the page.

5. Select the applicable Position by clicking the corresponding row.

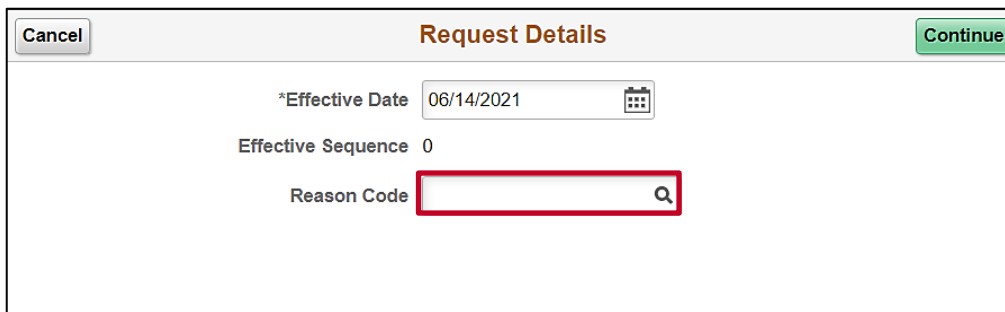


The **Position Details** page displays for the applicable Position.



6. Click the **Add a New Row** icon (+) to make the change to the Position.

The **Request Details** page displays in a pop-up window.



7. The **Effective Date** field defaults to the current date. Update as needed using the **Effective Date Calendar** icon.

Note: If a respective pay increase regarding this alternate grade is planned, ensure that the effective date is prior to the date of the compensation change.

8. The **Effective Sequence** field will default to the next sequential number if other changes have been entered on the Position with the same effective date.
9. Select the **Reason Code Look Up** icon to select the applicable reason for the change.
10. Click the **Continue** button.



Human Resources Job Aid

HR351: Updating Approved Salary Plans on Position

The **Manage Position** page displays with the **Position Data** Step displayed by default.

11. Scroll down to the **Salary Plan Information** section.

The remaining sections display.

Note: The **Salary Admin Plan/Grade** fields are grayed out and can't be changed.

12. Select the applicable Step using the **Step Look Up** icon.

The following page displays in a pop-up window.

HR351: Updating Approved Salary Plans on Position

13. Select the step required for the position update.

Once selected, the following displays at the top of the page.

Position Number	VCU1DHRM
Headcount Status	Open
Current Head Count	0 of 2

Next >

14. Click the **Next** tab in the right hand corner of the page until the **Review and Submit** page is displayed.

The **Review and Submit Step** displays.

Position Number: VCU1DHRM Headcount Status: Open Current Head Count: 0 of 2		< Previous Submit						
<div>1 Position Data Visited</div> <div>2 Specific Information Visited</div> <div>3 Budget Incumbents Visited</div> <div style="background-color: #e0f2f1;">4 Review and Submit Visited</div>	<p>Step 4 of 4: Review and Submit</p> <p>Effective Date: 06/14/2021 Reason Code: UPD Position Data Update</p> <p>Effective Sequence: 2 0 Approval Status: Not Available</p> <p>Summary Of Changes</p> <table border="1"> <thead> <tr> <th>Description</th> <th>Proposed Value</th> <th>Current Value</th> </tr> </thead> <tbody> <tr> <td>Step</td> <td>2</td> <td>1</td> </tr> </tbody> </table>		Description	Proposed Value	Current Value	Step	2	1
Description	Proposed Value	Current Value						
Step	2	1						

15. Review the changes made to the Position and then click the **Submit** button.

If there are no incumbents in the Position, the following **Warning** displays.

Warning – Update incumbents flag should be turned off for a position with no incumbents.

Since this position doesn't have employees assigned to it, the Update Incumbents flag should be turned off. Uncheck the Update Incumbents checkbox on the Specific Information page

OK
Cancel

16. Click the **OK** button.

The **Position Confirmation** displays.

Position Confirmation	
The Position Number VCU1DHRM has been successfully updated.	
Position Number: VCU1DHRM Headcount Status: Open Current Head Count: 0 of 2	
Go to Position Details	Go to Manage/Create Position

Note: Update the incumbent's job record with the new compensation rate. For further information on How to Complete a Compensation Change, see the Job Aid titled **HR351 How to Change Update Employee Compensation** Job Aid. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.